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Page Links

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Mexico

Mexico is a major non-OPEC oil producer and home to one of the world's largest oil companies, Pemex. Most of Mexico's oil exports go to the United States.

Note: Information contained in the is report is the best available as of February 2001 and can change.



BACKGROUND

In July 2000, Vicente Fox of the National Action Party (PAN) won an historic presidential election, ending 71 consecutive years of Institutional Revolutionary Party (PRI) rule. Fox was inaugurated as president of Mexico on December 1, 2000. Mexico is enjoying a period of rapid economic expansion, augmented by unprecedented political stability. President Fox has declared this to be the "Mexican moment," encouraging foreign investment in Mexico. He aims to increase Mexican gross domestic product

growth (GDP) to 7% in 2001. Neighbor and fellow NAFTA member the United States is by far Mexico's largest trade partner. Any slowdown in the U.S. economy would have adverse effects on the Mexican economy.

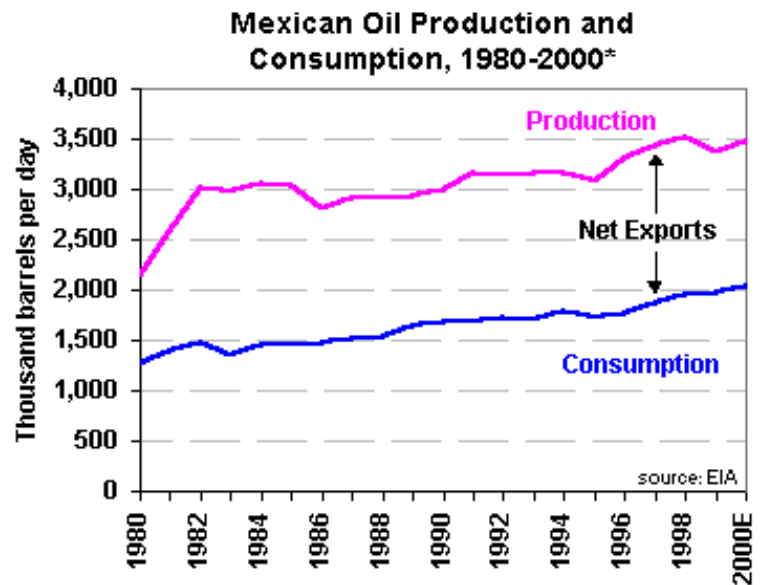
Fox has ambitious plans to restructure and modernize Mexican government and industry, especially the energy sector (although privatization of the state oil company Pemex has been ruled out as politically infeasible). Fox has stated his commitment to making the country less financially reliant on oil exports, which currently generate about one-third of government revenues. Mexico is producing and consuming rapidly increasing quantities of natural gas, and much of the country's vast gas reserves remain untapped. Finally, Fox is attempting to liberalize parts of the electricity sector in hopes of attracting foreign investment to the undersupplied industry. Some of Fox's proposed changes will require changes to the Mexican Constitution. It remains unclear that Fox will be able to generate the required two-thirds majority in the bicameral Congress to enact a constitutional change. The PRI is the largest party in the federal Congress (where no party has a majority) and the majority party in the Senate, and the PRI remains divided between a more progressive wing and a wing more resistant to change.

OIL

Mexico has the second largest proven crude oil reserves in the Western Hemisphere after Venezuela, at 28.3 billion barrels. In 2000, Mexico produced about 3.5 million barrels per day (bbl/d) of oil, with net oil exports of roughly 1.5 million bbl/d. Mexico ranked as the world's fifth-largest oil producer (including crude, lease condensate, natural gas liquids, and refinery gain) and tenth-largest oil exporter in 2000, with about 1.4 million bbl/d bound for the United States. The value of Mexican oil exports increased from \$6.4 billion in 1998 to an

estimated \$10.4 billion in 2000, and oil exports account for about a third of government revenues.

Mexico produces three grades of crude oil: heavy Maya-22, which accounts for more than half of total production; light, low-sulfur Isthmus-34, accounting for less than one-third of total production; and extra-light Olmeca-39, which is about one-fifth of total production. About three-quarters of Mexican production comes from the Campeche Bay in the Gulf of Mexico. Production at the largest field, Cantarell (located in the Gulf of Mexico of the Yucatan coast), is expected to increase in the next two years. Recent investment in the oil sector has focussed more on enhancing production at existing fields than on exploration for new fields. Mexico is expected to add as much as 200,000 bbl/d of production capacity in the first half of 2001.



*Please note that data for 2000 are estimated.

Underscoring its key position in world oil markets, Mexico often has worked in tandem with Organization of Petroleum Exporting Countries (OPEC) to increase or decrease oil production. On January 17, 2001, OPEC decided to cut production by 1.5 million bbl/d, beginning February 1. Mexico announced later that month that it would aim to export 1.75 million bbl/d during 2001, an amount roughly analogous to its exports at the end of 2000 but slightly lower than the 1.825 planned in the 2001 budget. Mexican officials have expressed keen awareness that high oil prices, while useful for generating government revenues, could prove deleterious for Mexican industry and for the overall economy of its neighbor and the world's largest oil importer, the United States. It is widely accepted that an economic slowdown in the U.S. would have a negative effect on the Mexican economy.

The Mexican oil industry was nationalized in 1938. *Petroleos Mexicanos* (Pemex), the state oil company, is one of the world's largest oil companies, the single most important entity in the Mexican economy, and a symbol of Mexican sovereignty and independence. Pemex is the only company in the Mexican oil market, upstream and downstream. While the company is criticized widely as being bloated and inefficient, privatization is not on the agenda. The state-run organization of the sector enjoys enthusiastic public support, and President Fox retracted early campaign promises to privatize Pemex and has vowed instead to modernize and streamline the oil giant. Toward that end, a new board of directors was named in mid-February 2001. The board, consisting heavily of corporate heads, is charged with renewing Pemex through "corporate innovation."

A maritime boundary dispute between Mexico and the United States was settled in June 2000. The Western Gap area, halfway between the Yucatan and Texas coastlines, is more than 200 miles from either shore and therefore outside either country's "exclusive economic zone". Under international law, Mexico and the United States had to agree on a boundary, and the two countries have agreed that 62% of the region belongs to Mexico and 38% to the United States. Companies are expected to take active interest in the area, as technological advances now will allow drilling in the 10,000-foot-deep waters.

Pemex is upgrading its oil transport infrastructure. Currently, there are 2,625 miles of crude oil pipelines and 5,322 miles of oil product pipelines. A 700-mile pipeline currently under construction will connect production from offshore Veracruz to refineries.



Downstream

Mexico's downstream oil sector was nationalized in the 1950s, and privatization is not planned. Although Mexico is one of the world's largest oil producers, about a quarter of gasoline consumption is imported due to insufficient refinery capacity. The country has six refineries, with a total throughput capacity of 1.5 million bbl/d. Major upgrades on the refineries begun in 1998 aim to: increase the percentage of gasoline and light products refined; allow refineries to process heavier crudes, such as Mexican Maya; meet clean fuel specification; and increase overall refining capacity by 690,000 bbl/d. Work is underway at four refineries, while contracts for work at the two remaining refineries

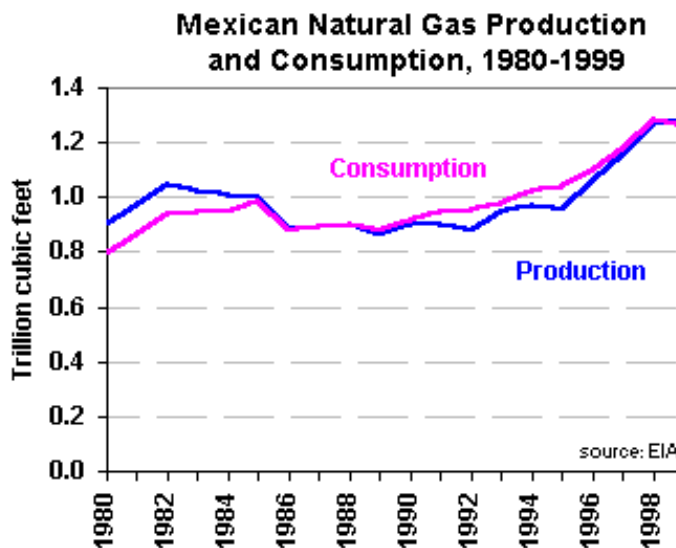
remain in the bidding process. All work is expected to be completed by 2004.

NATURAL GAS

Mexico has proven natural gas reserves of 30.4 trillion cubic feet (Tcf), with 1999 production of about 1.29 Tcf and consumption of about 1.26 Tcf. Mexico has not emphasized natural gas development and exploration until recently. Most of the gas now produced is "associated" gas that occurs as a coproduct of oil production.

Mexico is a small net importer of U.S. gas, a trend that is expected to continue in the coming decades. The tariff on Mexican imports of U.S. gas was eliminated in mid-1999, which will encourage continued and growing volumes of imports in the future.

Natural gas is slated to play a more important role in the future as demand rises quickly, especially in the power sector. In response to anticipated demand growth, Pemex plans to increase Mexican-U.S. border infrastructure and capacity, and to focus more on gas exploration activities. The Burgos field, located in northeastern Mexico, is expected to contain massive volumes of largely non-associated, recoverable natural gas resources. Cantarell holds significant gas reserves in association with oil deposits, most of which is flared. Pemex predicts that gas production will increase more than 50% from current levels by 2008. Pemex will invest almost twice as much capital in gas exploration and development activities in 2001 as it did in 2000.



Mexico's growing reliance on natural gas is coinciding with historically high price levels for the fuel in North America. The Mexican gas price was fixed to the Houston Ship Channel price in Texas in the early 1990s. As U.S. natural gas prices spiked in early 2001, Fox came under pressure from Mexican industry and labor unions who claimed that high prices were causing irreversible damage to Mexican industry. In the wake of industrial plant closures in early January, an agreement was reached whereby Pemex will sell natural gas to businesses at a fixed price of \$4 per million Btu for the next three years (compared to the U.S. Houston Ship Channel price that reached over \$9 per million Btu in January). Pemex will cover the difference when gas prices are above \$4 per million Btu, but companies will continue to pay that price even if international prices drop below the \$4. The \$4 per million Btu price is retroactive to January 1, 2001.

Sector Organization

The natural gas industry is the most liberalized of Mexico's energy sectors. While upstream exploration and production is the sole domain of Pemex, the downstream gas market has been open to private investors since the passage of the 1995 Natural Gas Law. This legislation modified the constitution to allow private companies to become involved in gas transportation, storage, and distribution in Mexico, although it prohibits a company from ownership in more than one function within the industry. The legislation also liberalized exports and imports and established the regulatory framework for building and expanding transmission and distribution pipelines.

The Mexican Energy Regulatory Commission (CRE) regulates the gas industry. CRE's powers include enforcement of regulations, inspections of facilities, issuance of permits, regulation of prices, overall supervision of the industry, ensuring an adequate supply, security, the promotion of competition, and the elimination of cross-

subsidies. Private-sector participation in these areas currently is subject to permits granted by CRE for 30 years, based on competitive bidding.

Despite early indications that the United States would dominate private investment in Mexico's gas market, European companies, led by Spain's Gas Natural and increasingly by Belgium's Tractabel, currently have a larger presence than U.S. companies. Sempra Energy International is the only U.S.-based company with significant involvement in the sector at present.

Pipelines

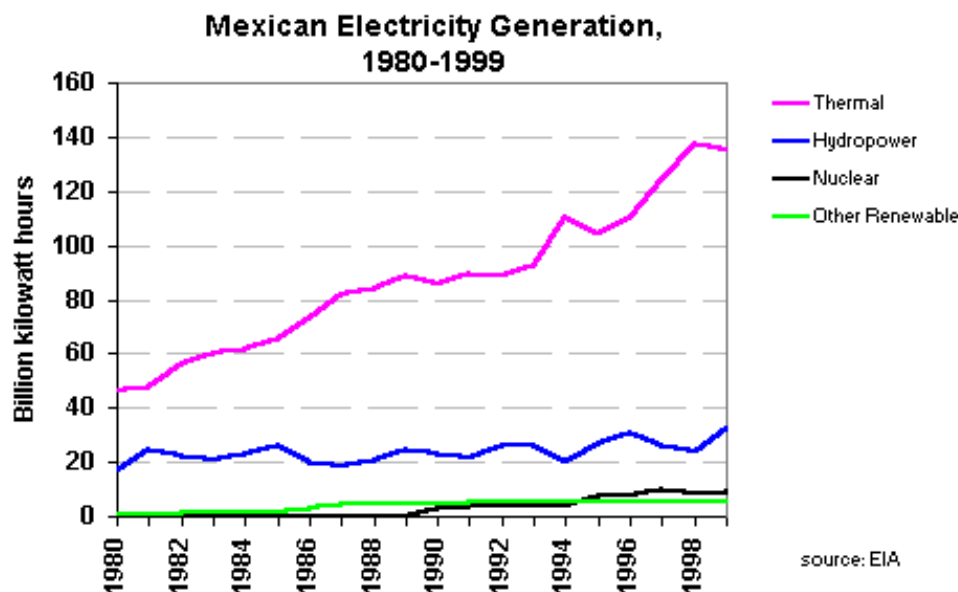
A major constraint on natural gas development in Mexico has been the lack of investment in pipelines for transporting gas over long distances. While much of Mexican demand growth is in the north, production is located in the south (offshore of the Yucatan peninsula). New pipelines are planned, especially trans-border connections linking Mexico and the United States. The Texas Railroad Commission and CRE officials met in September 2000 to discuss how best to cooperate to promote construction of U.S.-Mexico gas infrastructure.

A consortium of Sempra, PG&E, and Mexico's Proxima Gas plans to build a \$230-million, 30-inch, 400-million-cubic-foot-per-day, 212-mile pipeline. It will connect the U.S. and Mexican natural gas grids, beginning with an interconnection with El Paso Natural Gas Company in Arizona, running through southeastern California and northern Baja California to connect with the Rosarito Pipeline, south of Tijuana. This "North Baja" pipeline will fuel a power plant that currently is powered by oil as well as expected new gas-fired electric capacity in the region. Baja California currently is experiencing rapid energy demand growth, much of which stands to be satisfied with U.S. gas. The pipeline could come onstream in 2003.

COAL

Mexico has recoverable coal reserves of about 1.3 billion short tons, just over 70% of which is anthracite and bituminous, and just less than 30% of which is lignite and subbituminous. The majority of the country's coal reserves are located in Coahuila, in the northeast of the country, bordering the United States. Coal production has remained stable in the past few years and is used mostly for steel production and electricity generation. U.S.-based Mission Energy, which purchased the previously government-owned company *Minera Carbonifera Rio Escondido* (MICARE) when it was privatized, is now Mexico's largest coal producer. A small volume of imports from the United States, Canada, and Colombia augments domestic coal supplies.

Coal-fired plants supply roughly 10% of Mexico's electricity, but this percentage is slated to fall as natural gas-fired power plants are favored to meet rising demand. Mexican coal has very high ash content and therefore is mixed with lower-ash imported coal. The Federal Electricity Commission (CFE) recently agreed that Mexican coal will be used for another three years to fuel two power plants near the Coahuila mines, despite the uncompetitiveness of Mexican coal as compared to imports. Last year, coal from local mines cost the CFE 38% more than imported coal.



ELECTRICITY

Mexico has installed electric capacity of 38.5 million kilowatts (38.5 thousand megawatts) and in 1999 generated 182.5 billion kilowatthours (bkwh). Oil-fired plants make up the largest share of electricity generation, and thermal (oil, gas, and coal) electricity generation in 1999 accounted for 74% of total generation. Hydropower accounted for 18%, nuclear power 5%, and other renewable sources (wind, solar, biomass) 3%. Mexico's industrial energy policy calls for conversion of many oil-fired power plants to natural gas by 2005. Most new power plants will be run on natural gas.

Mexico's electricity sector is at a crossroads. Although generation has increased rapidly over the past decade, supply is not expected to meet demand growth over the next two decades. Given current grid capacity constraints, shortages could result; regular shortfalls resulting in nationwide blackouts are predicted within the next two years. Failure to make substantial investments in generation capacity and infrastructure could adversely affect the international competitiveness of key northern industrial regions. Although about 95% of Mexican households are electrified, there are still many thousands of rural towns without electricity.

Sector Organization

The Federal Electricity Commission (CFE) and *Luz y Fuerza Centro* (LFC) are Mexico's two state-owned electricity companies. CFE has enjoyed a monopoly in the electric power sector for decades, although reforms instituted in 1992 allow independent power producers (IPPs) and cogenerators limited involvement. CFE generates about 92% of Mexican electricity. LFC contributes about 2%, with most of its customers in Mexico City. Pemex generates 4%, while the remainder is generated by the private sector.

Deregulation of the electricity sector is a contentious issue in Mexico. President Fox has made privatization of the industry a top priority, as private investment will be needed to meet the country's rapidly increasing electricity demand. His reforms already have met strong resistance. Fox had planned to submit a reform bill for electricity privatization before the end of 2000, but that bill now is expected in March 2001. The bill is expected to call for a change in the constitution to allow private generators to sell electricity in a wholesale market and to establish a separate electricity regulatory body. Currently, only the state power companies can distribute and sell electricity to the general public. Fox has pledged not to privatize CFE during his presidency.

IPPs are allowed to build and own power generation facilities, and the power can be used at related industrial companies or sold under long term contracts to the public utilities. As of February 2001, 12 IPP permits have been issued for a total investment of \$3 billion. The projects are expected to add over 6,000 megawatts (MW) of capacity by 2004. The natural gas and electricity shortages in the U.S. are having a negative effect on IPP development in Mexico. Of the 12 IPP projects in progress, 10 are in northern Mexico; 5 of these are totally dependent on natural gas imports from the U.S., while the other 5 are partially dependent on U.S. imports. Uncertainty regarding import sources could explain the low level of interest in new projects offered by CFE.

Subsidies paid to agricultural and residential electricity consumers and to LFC and the lack of an open power market are blamed for escalating industrial electricity costs, now above average international industrial electricity costs. Mexican industry warns that these costs will make Mexican industry internationally uncompetitive.

Infrastructure

Mexico has a national interconnected power grid divided into four regional divisions: Northern, North Baja, South Baja, and Southern (the largest). Northern Mexico is connected to the U.S. grid, and additional interconnections are planned. In July 2000, a cable from Eagle Pass, Texas to Piedras, Mexico connected U.S. utility AEP and CFE's transmission systems. This is a new kind of electric connection, using asynchronous (high-voltage direct-current) technology to combat the problem of differing power currents between countries. A New Mexico utility is working on a project to connect a power station outside of Phoenix, Arizona to CFE's system in Sonora, Mexico. A proposed project aims to link Tucson, Arizona to points south of the U.S.-Mexican border. Along the Mexican-California border in Baja California, new plants are under construction to meet growing demand in Baja and to allow Mexico to increase electricity exports to U.S. markets.

ENVIRONMENT

Mexico has a 5-year National Environmental Program (1996-2000) which is expected to invest \$13.3 million to reduce air pollution in and around Mexico City. The project is intended to serve as an example for other major cities. Mexico also has introduced a federal tax incentive program for purchases of pollution control equipment, and has reformed its General Law of Ecological Equilibrium and Environmental Protection (LGEEPA). Under LGEEPA, Mexico's ministries dealing with environmental and natural resource issues have been reorganized. The Ministry of Environment, Natural Resources, and Fisheries is designed to modernize and centralize Mexico's federal environmental policy and enforcement. The National Institute of Ecology is responsible for executing environmental policy, while the Federal Attorney General for Environmental Protection carries out environmental inspections and negotiates compliance agreements with businesses and industrial groups in Mexico.

While Mexico contributes only 1.6% of the total world energy-related [carbon emissions](#), it is a major contributor, along with Brazil, Argentina, Venezuela, Colombia and Chile, in Latin America. Mexico's [carbon intensity](#) is relatively high in comparison with most other countries of Central and South America. If policies are implemented as envisioned, however, carbon intensity likely will decrease in the future. [Per capita](#) energy consumption and carbon emissions are also high in comparison with other countries in the region, however, Mexico's per capita energy consumption and carbon emissions are low when compared to fellow OECD members. Mexico's status as a developing country, as well as a member of OECD, has placed it in a unique position in the current [climate change](#) negotiations.

There are many opportunities to exploit the use of [renewable](#) energy technologies in Mexico. In March 1998, the U.S. Initiative on Joint Implementation selected a project aimed at building a hybrid system to utilize solar, wind, and diesel capacity in San Juanico, Baja California Sur. The project involves Arizona Public Service Co., Niagara Mohawk Corp., and CFE. In April 1998, Switzerland's Asea Brown Boveri (ABB) announced that it would supply an advanced, high-efficiency, low-emissions power plant to CFE for \$250 million.

COUNTRY OVERVIEW

President: Vicente Fox Quesada (since December 1, 2000)

Independence: September 16, 1810 (from Spain)

Population (July 2000E): 100.3 million

Location/Size: Southern N. America/762,000 square miles (nearly three times the size of Texas)

Major Cities: Mexico City (capital), Guadalajara, Monterrey, Puebla

Languages: Spanish, various Mayan, Nahuatl, and other regional indigenous languages

Ethnic Groups: Mestizo (Indian-Spanish), 60%; Amerindian, 30%; Caucasian, 9%; Other, 1%

Religions: Roman Catholic, 89%; Protestant, 6%, Other, 5%

Defense (8/98): Army: 130,000, Navy: 37,000, Air Force: 8,000, Rural Defense Militia: 14,000

ECONOMIC OVERVIEW

Secretary of Finance and Public Credit: Francisco **Gil** Diaz

Secretary of Economy: Luis Ernesto **Derbez** Bautista

Currency: 1 Peso = 100 centavos

Market Exchange Rate (02/13/01): US\$1 = 9.717 pesos

Gross Domestic Product (GDP, in 1990 \$, 2001E): \$385 billion

Real GDP Growth Rate (2001E): 4.4% (although Fox hopes to raise this to 7.0%)

Inflation Rate (consumer prices, 2001E): 7.8%

Major Trading Partners: United States, Canada, Japan, Germany, and United Kingdom

Current Account Balance (2001E): -\$16.5 billion

Merchandise Trade Balance (2001E): -\$5.7 billion

Exports: \$182.9 billion

Imports: \$188.6 billion

Major Export Products: products from maquiladoras, oil

Major Import Products: products for maquiladoras, consumer goods, capital goods, raw materials and intermediate goods

Total External Debt (2001E): \$166 billion

ENERGY OVERVIEW

Energy Minister: Ernesto **Martens** Rebolledo

Head of PEMEX: Raul **Munoz** Leos

Proven Oil Reserves (1/1/01E): 28.3 billion barrels

Oil Production (2000E): 3.5 million barrels per day (bbl/d), of which 3.0 million bbl/d was crude

Oil Consumption (2000E): 2.0 million bbl/d

Net Oil Exports (2000E): 1.5 million bbl/d

Crude Oil Refining Capacity (1/1/01E): 1.5 million bbl/d

Natural Gas Reserves (1/1/01E): 30.4 trillion cubic feet (Tcf)

Natural Gas Production (1999E): 1.29 Tcf

Natural Gas Consumption (1999E): 1.26 Tcf

Recoverable Coal Reserves (12/31/96E): 1.3 billion short tons

Coal Production (1999E): 11.0 million short tons

Coal Consumption (1999E): 13.1 million short tons

Net Coal Imports (1999E): 2.1 million short tons

Electric Generation Capacity (1/1/99E): 38.5 million kilowatts

Net Electricity Generation (1999E): 182.5 billion kilowatthours (bkwh); 74% thermal, 18% hydro, 5% nuclear, 3% other

Net Electricity Consumption (1999E): 164.8 bkwh

Net Electricity Imports (1999E): 1.0 bkwh

ENVIRONMENTAL OVERVIEW

Secretary of Environment & Natural Resources: Victor Lichtinger

Total Energy Consumption (1999E): 6.1 quadrillion Btu* (1.6% of world total energy consumption)

Energy-Related Carbon Emissions (1999E): 100.6 million metric tons of carbon (1.6% of world carbon emissions)

Per Capita Energy Consumption (1999E): 63.2 million Btu (vs U.S. value of 355.9 million Btu)

Per Capita Carbon Emissions (1999E): 1.0 metric tons of carbon (vs U.S. value of 5.6 metric tons of carbon)

Energy Intensity (1999E): 17,766 Btu/\$1990 (vs U.S. value of 12,638 Btu/\$1990)**

Carbon Intensity (1999E): 0.31 metric tons of carbon/thousand \$1990 (vs U.S. value of 0.20 metric tons/thousand \$1990)**

Sectoral Share of Energy Consumption (1997E): Industrial (54.2%), Transportation (25.0%), Residential (16.2%), Commercial (4.6%)

Sectoral Share of Carbon Emissions (1997E): Industrial (50.2%), Transportation (31.9%), Residential (13.1%), Commercial (4.9%)

Fuel Share of Energy Consumption (1999E): Oil (65.6%), Natural Gas (21.5%), Coal (3.9%)

Fuel Share of Carbon Emissions (1999E): Oil (75.2%), Natural Gas (18.9%), Coal (6.0%)

Renewable Energy Consumption (1997E): 724 trillion Btu* (7% decrease from 1996)

Number of People per Motor Vehicle (1997): 7 (vs U.S. value of 1.3)

Status in Climate Change Negotiations: Non-Annex I country under the United Nations Framework Convention on Climate Change (ratified March 11th, 1993). Signatory to the Kyoto Protocol (signed June 9th, 1998- not yet ratified).

Major Environmental Issues: Natural fresh water resources scarce and polluted in north, inaccessible and poor quality in center and extreme southeast; raw sewage and industrial effluents polluting rivers in urban areas; deforestation; widespread erosion; desertification; serious air pollution in the national capital and urban centers along US-Mexico border

Major International Environmental Agreements: A party to Conventions on Biodiversity, Climate Change, Desertification, Endangered Species, Hazardous Wastes, Law of the Sea, Marine Dumping, Marine Life Conservation, Nuclear Test Ban, Ozone Layer Protection, Ship Pollution, Wetlands and Whaling

* The total energy consumption statistic includes petroleum, dry natural gas, coal, net hydro, nuclear, geothermal, solar and wind electric power. The renewable energy consumption statistic is based on International Energy Agency (IEA) data and includes hydropower, solar, wind, tide, geothermal, solid biomass and animal products, biomass gas and liquids, industrial and municipal wastes. Sectoral shares of energy consumption and carbon emissions are also based on IEA data.

**GDP based on EIA International Energy Annual

ENERGY INDUSTRY

Organization: *Oil and natural gas* - Petroleos de Mexicanos (Pemex), four operating subsidiaries (Exploration and Production, Refining, Gas and Basic Petrochemicals, Secondary Petrochemicals), Petroleos Mexicanos Internacional (PMI); *Electric power and distribution* - CFE and LFC; *Natural gas and electric power regulation* - Comission Reguladora de Energia (CRE)

Major Ports: Gulf Coast - Cayo Arcos, Dos Bocas, and Pajaritos (handle most of Pemex's oil exports), Tuxpan, Ciudad Madero; Pacific Coast - Salina Cruz, Rosarito

Major Oil-Producing Fields: Cantarell, Abkatun, Ku, Caan, Pol, Chuc

Major Refineries (Crude Capacity) : Salina Cruz (330,000 bbl/d), Tula Hidalgo (320,000 bbl/d), Salamanca (245,000 bbl/d), Cadereyta (235,000 bbl/d), Minatitlan (200,000 bbl/d), Ciudad Madero (195,000 bbl/d)

Sources for this report include: Argus Latin American Energy; CIA World Factbook; DRI McGraw-Hill Companies, Global Power Report; Dow Jones News wire service; Economist Intelligence Unit ViewsWire; Financial Times; Oil and Gas Journal; Oil Daily; Petroleum Economist; U.S. Energy Information Administration; WEFA Eurasia Economic Outlook.

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CFE

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